Banner Navigation

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Information Non-disclosure at NMSU

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPPA), and the Gramm-Leach-Bliley Act GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as social security numbers.

Family Educational Rights and Privacy Act of 1974 (FERPA) Policy:
http://research.nmsu.edu/compliance/IRB/resources.html#3
FERPA protects students' records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

Health Information and Portability Accountability Act (HIPAA):
http://research.nmsu.edu/compliance/IRB/resources.html#7
HIPPA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper, or orally.

Gramm-Leach-Bliley (GLB) Act:
http://www.nmsu.edu/manual/documents/07-29-09-policy-manual-final020110.pdf
GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver's license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

The New Mexico State University Policy Manual, **Chapter 2** General Operating Policies, Section 2.90 contains specific information related to disclosure of records and information.

Account Structure

What is FOAPAL?

FOAPAL is the acronym for the account number within the Banner system. Each letter represents a piece of the account number: Fund, Organization, Account, Program, Activity, and Location. **FOAPAL** is the key used for entering financial transactions.

Required Segments **Optional Segments**

Chart	Fund	Organization	Account	Program	Activity	Location
C	F	O	A	P	A	L

The shortcut…

To process accounting transactions, departments will need to use an Index Code and an Account Code.

Index

The charge center where the payroll expenditures related to the employee will be posted for each pay period. Entry of the index will automatically populate the corresponding Fund, Organization, Program, and in some cases Activity and/or Location.

Account Code

Type of expenditure transactions. For payroll related transactions, these values are automatically generated from the Banner Human Resources System.

Example

The Index number **100839** was entered. This is what is displayed:

COA	Index	Fund	Orgn	Account	Program	Activity	Location	Project
N	100839	110000	530340		1310			

Banner Navigation

Getting Started

In this section you are given some background information that you will need before you can start using Banner, including understanding how to access the system and a basic understanding of the system design.

Terminology

Understanding the terms provided in this manual help you to understand the explanations and instructions presented in this manual and to present clear, specific questions that you may have about the information provided.
This table defines the basic components of the Banner suite.

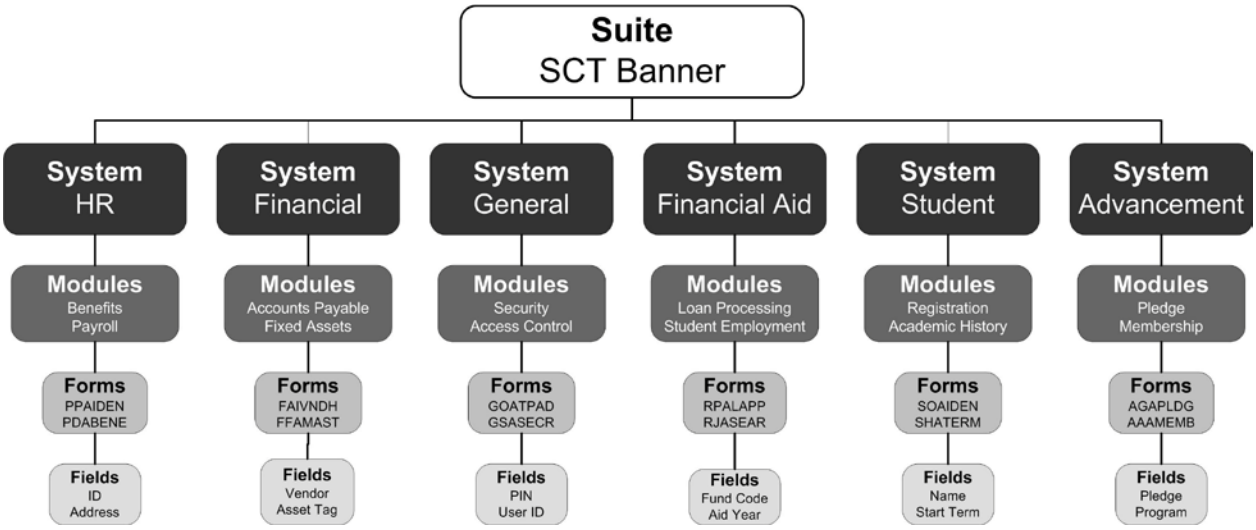
Suite	The SunGard Higher Education Banner suite is an administrative software application developed specifically for higher education institutions by SunGard. The software acts as an interface between users and an Oracle database containing New Mexico State University administrative data.
System	The NMSU Banner suite is composed of six systems: General, Student, Advancement, Financial, Human Resources, and Financial Aid.
Modules	Each system is composed of specific modules that "break out" components of the system.
Forms	Forms are screens that contain fields.
Fields	Fields are areas in a form that are used either to display specific data (such as a last name, address, or NMSU ID number), or to insert data.
Validation Tables	Validation tables contain Lists of Values (LOVs) that are pre-defined for a specific field.
Blocks	Blocks are groups of related fields within a form.

Banner Structure

Banner is organized as a hierarchy. The Banner hierarchy includes:

- Suite
- Systems
- Modules
- Forms
- Fields.

This image shows the structure of Banner Suite components including sample systems, modules, forms, and fields.



Naming Conventions

All Banner forms, reports, jobs, and tables have seven character names that follow the structure rules outlined below.

Using the Student Person Identification or PPAIDEN form as an example:

Name:	**P**	**P**	**A**	**I**	**D**	**E**	**N**
Position:	**1**	**2**	**3**	**4**	**5**	**6**	**7**

Position 1—identifies the product owning the form, report, process or table. In the case of the PPAIDEN form, the first letter **P** refers to **HR/Payroll/Personnel**.
Position 2—identifies the application module owning the form, report, process or table. In the case of the PPAIDEN form, the second letter **P** refers to **General Person**.
Position 3—identifies the type of form, report, job, or table. In the case of the PPAIDEN form, the third letter **A** refers to an **Application** form.
Positions 4, 5, 6, and 7—are **unique identifiers** for the form, report, job, or table. In the case of the PPAIDEN form, the last four letters **IDEN** refers to **Identification**.

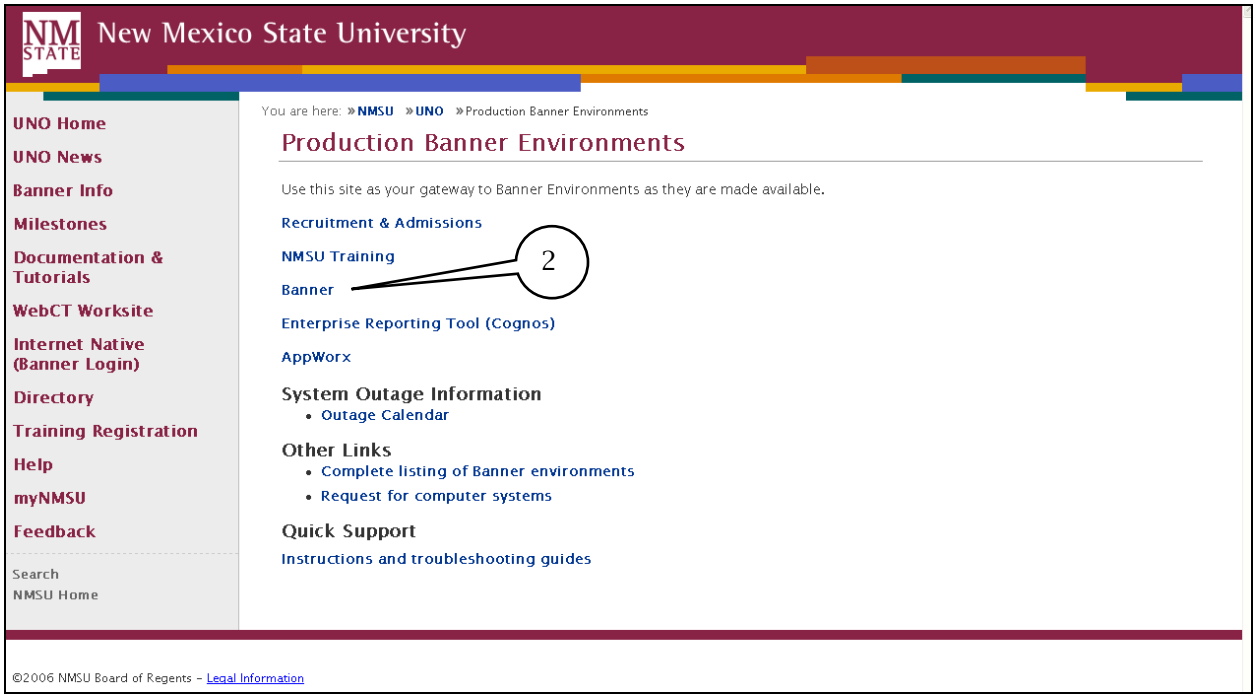
Logging on to Banner

Banner supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use Banner as an authenticated user, you must successfully log on by providing your credentials: NMSU Username, and Banner Password.

Banner can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type **http://www.nmsu.edu/erp/** in the address bar of your web browser and press Enter.

The Production Banner Environments page will appear.

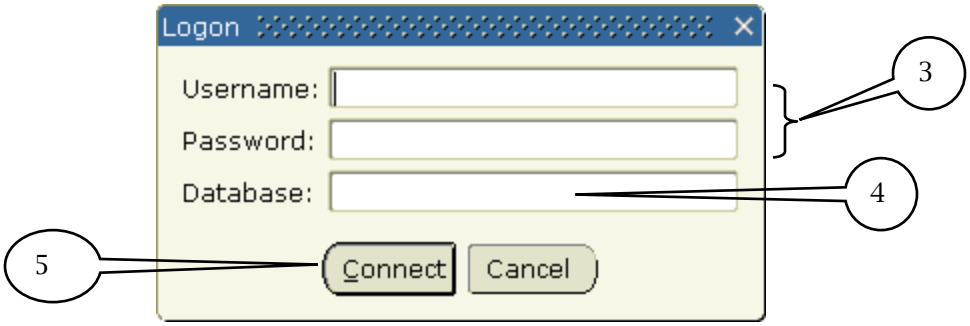


2. Click on the Banner link.

Team Tip:

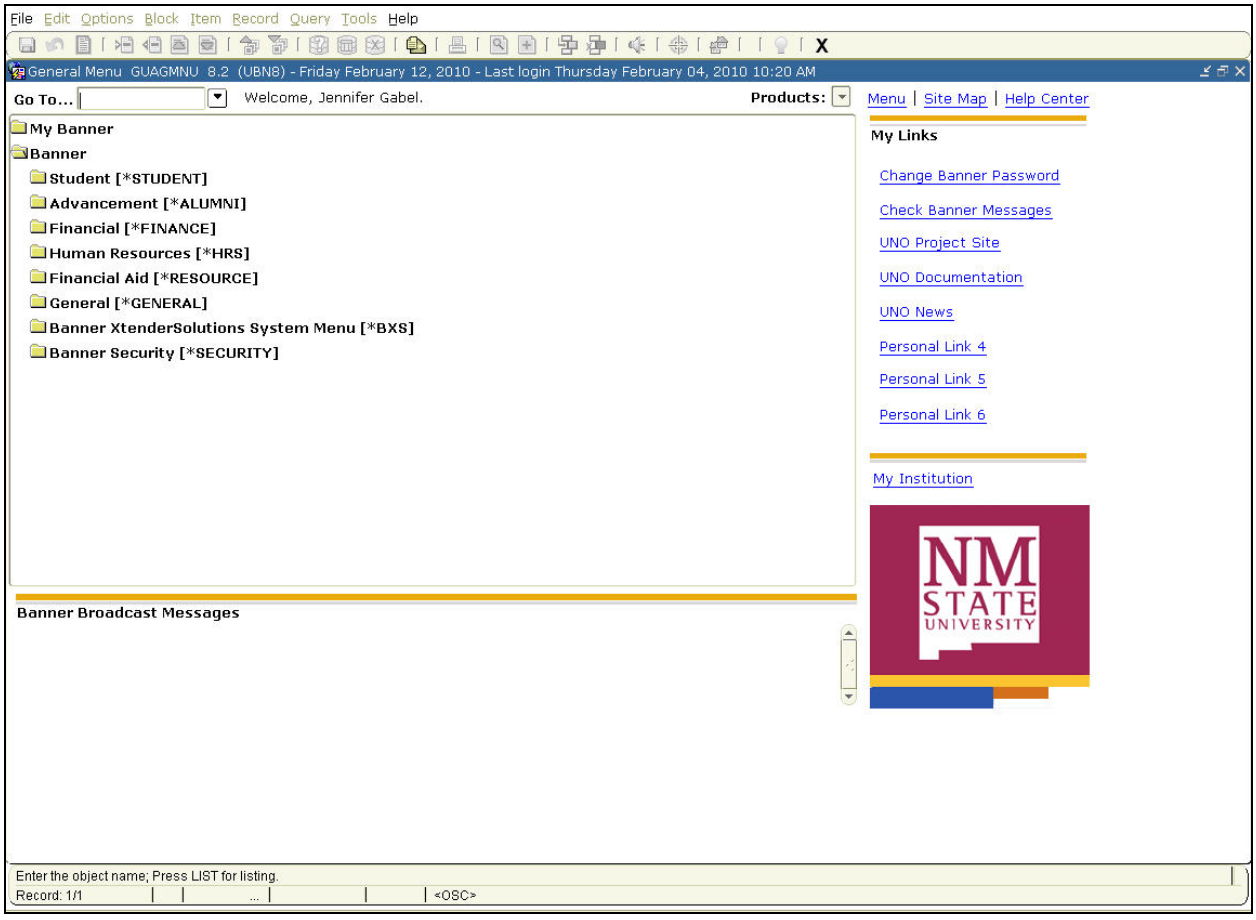
You can create a bookmark in your browser for quick access to Banner.

The **Logon** screen will be displayed.



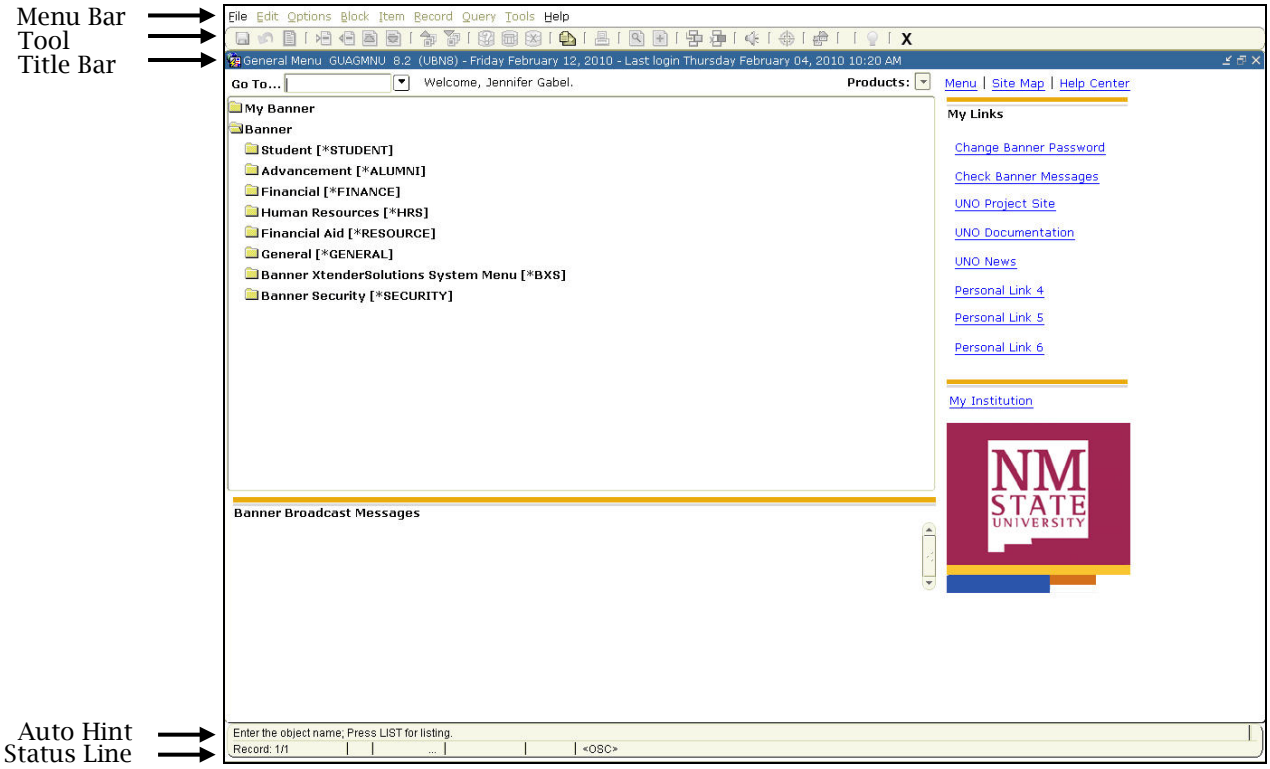
3. Enter **Username** and **Password**.
4. **Database** field remains blank.
5. Click on the **Connect** button.

The **General Menu** form, **GUAGMNU**, will be displayed.



Introducing the Banner Interface

Internet Native Banner (INB) is the Web version of the new Enterprise Resource Plan (ERP) system NMSU employees use to access vital university administrative information. You must access INB through a Web browser. Once you have logged onto Banner you will be presented with the **Main Menu**. This menu is the starting point for navigating throughout Banner.



Menu Bar

Using the menu bar at the top of every form, you can access an option using a drop-down menu at any time, except when you are working with a dialog box, alert box, or List of Values (LOVs). If a menu item is dimmed, the item is unavailable.

Tool Bar

Toolbars are sets of buttons that perform common functions.

Note: When you move your cursor to a button and pause for a second or two, a yellow rectangle appears with text that describes the function of the button.

To use a button function, click the appropriate button. You can click a button any time, except when you are working within a dialog box, alert box, or List of Values (LOV). A dimmed button is disabled and cannot be clicked.

Title Bar

The title bar shows the descriptive form name, the seven-character form name (FOAIDEN), the release number of the form software, and the name of the database you're logged into.

Auto Hint

The auto hint at the bottom of the form can contain the following information for the field where the cursor is located:

- Brief field description
- Error and processing messages
- Keyboard equivalents, if you can access other blocks, windows, or forms from the field.

Status Line

The status line directly under the auto hint line can contain one or more of the following messages:

Record: n/n	Shows the number of the current record followed by the total number of records in the current block. If there are more records than fit in the window, the total appears as a question mark (for example, 3/?) until you scroll to the last record in the block. Once the last record is displayed, the total appears as a number (for example, 3/15).
List of Values	Indicates the field has a List of Values.
Enter Query	Indicates the form is in query mode.

My Links

The My Links section of the Main Menu allows you to customize the menu to meet your needs. You can also access outside Web pages. One of the standard links is to the NMSU home page. There are six Personal Links that allow you to choose certain Web pages to access.

Accessing Forms in Banner

In the Banner Suite, the term “forms” can be thought of as “screens.” The five-form types below are the most common:

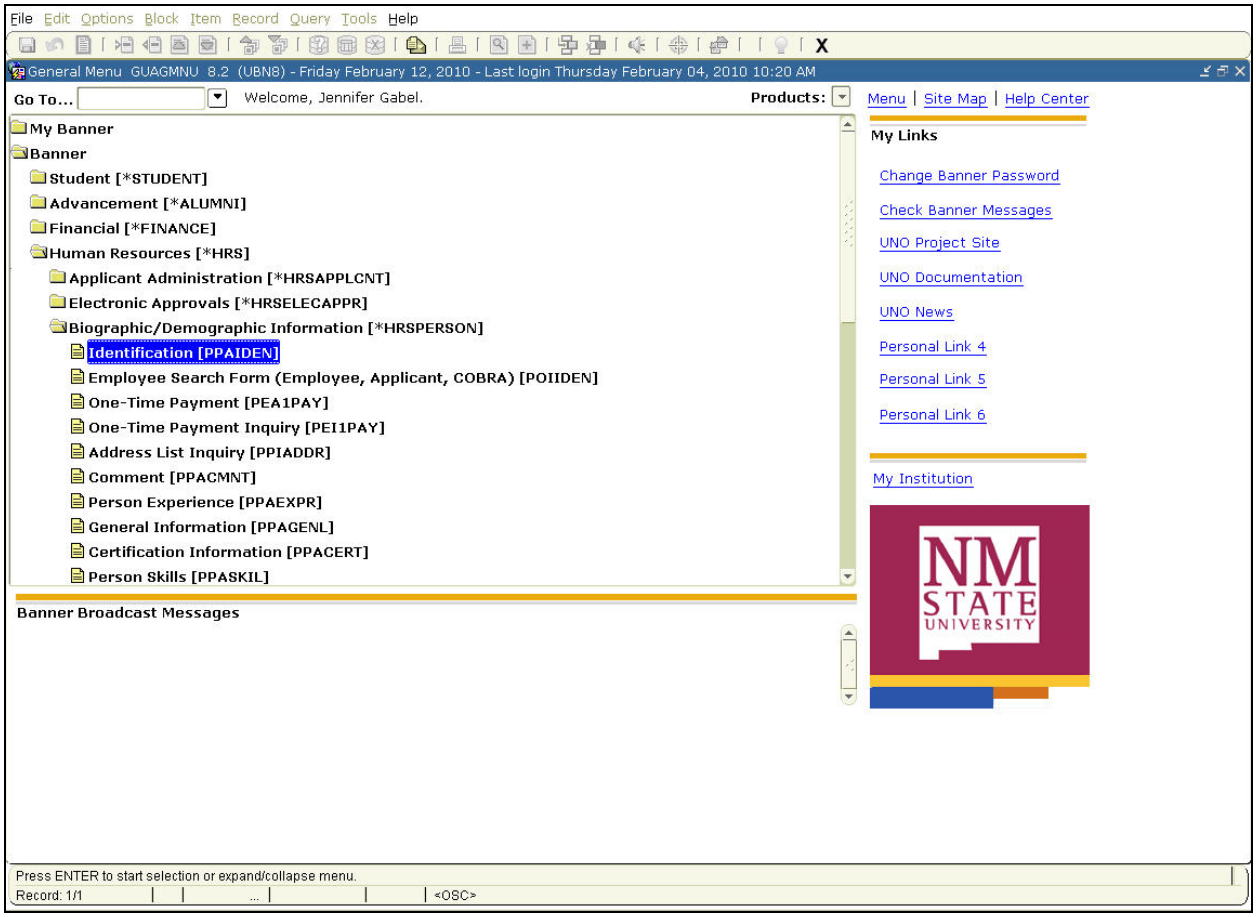
Main Menu	Used to navigate through Banner.
Application forms	Used to enter, update, and query information.
Validation forms	Used to define values. When you look up a code or select the list function, these values appear.
Query forms	Used to look up existing information. You must access these forms from another form.
Inquiry forms	Used to look up existing information. They can be accessed from the Main Menu, from another form with Direct Access, or with Object Search.

Although there are several ways to navigate in Banner, you must navigate to a form to be able to look up or process information.
In this section, you will be introduced ways of navigating in Banner:

- Using the Main Menu
- By Form Name
- Searching for a Form
- Selecting a Recently Accessed Form

Navigating Using the Main Menu

The **Main Menu** allows you to select forms in Banner. Each system in Banner is represented by a folder, which can be expanded to view nested folders or forms in that system.
You can easily navigate through the system by expanding the nested folders. Once you see the item you want listed, open it by double-clicking.

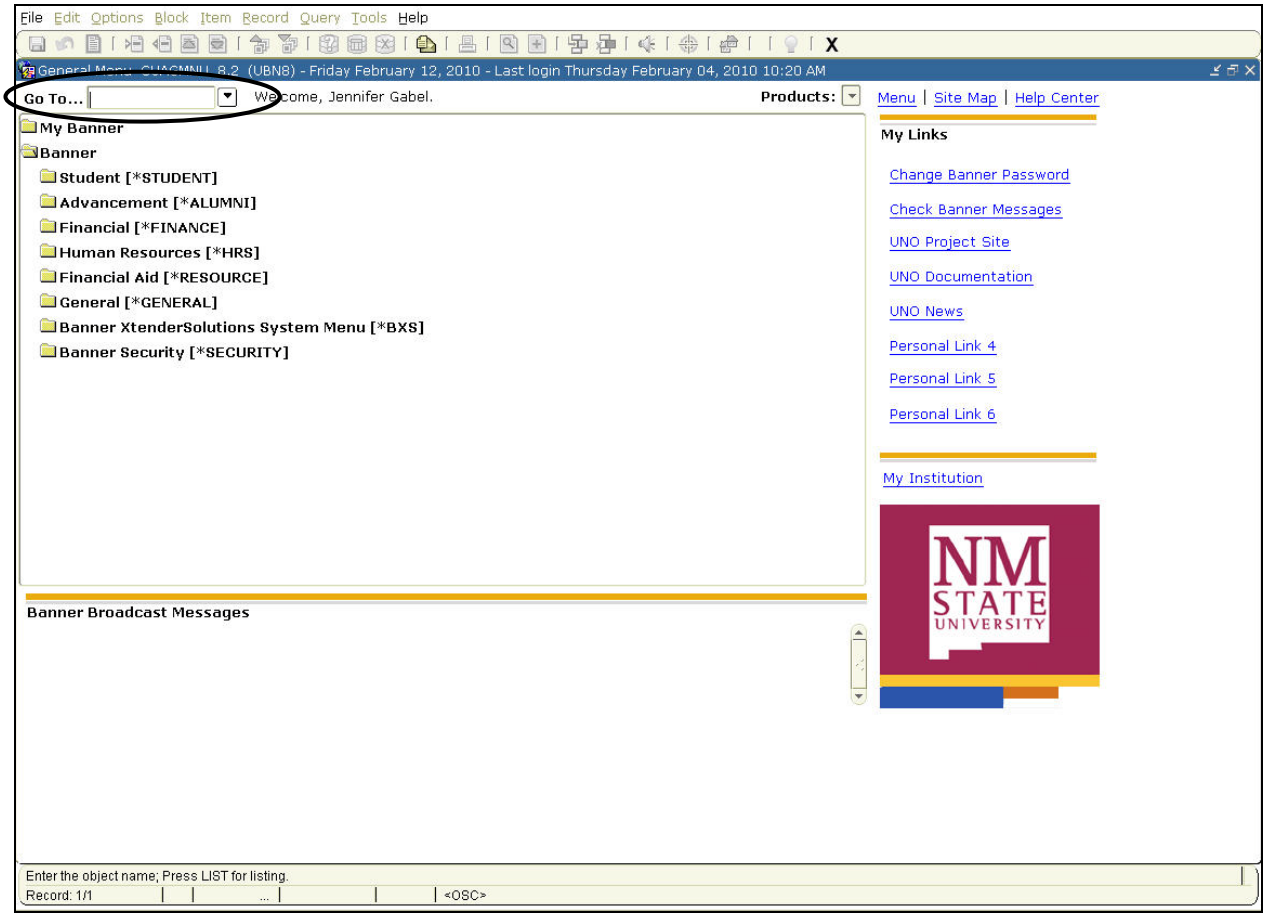


Navigating Using the Form Name

You can navigate to a form by using the seven-letter form name in the Direct Access **Go To** field. Direct Access can be used from either the Main Menu or a form. Once you are accustomed to Banner's interface and the form names, Direct Access is very convenient.

Using Direct Access from the Main Menu

The **Main Menu** has the option of Direct Access from the **Go To** field.



1. In the **Go To** field, type the seven-character name of the form.
2. Press **ENTER**.
   The form displays.

Using Direct Access from a Form

You can also use **Direct Access** while a form is open.

3. From the **File** menu, click **Direct Access.**
   The **Go To** menu will display at the top of your current form.

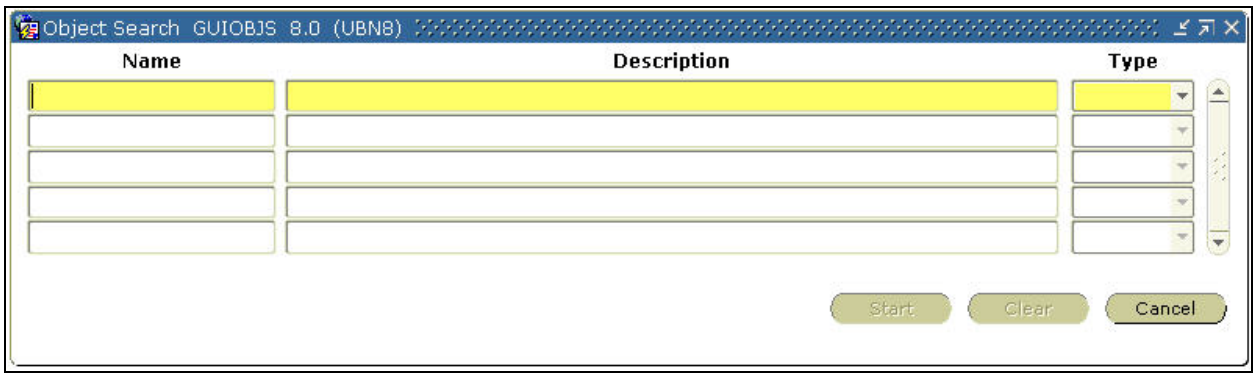
4. Type the seven-character name of the form in the field next to **Go To**.
5. Press **ENTER**.

Note: When you use Direct Access from a form, the current form remains open. When you exit the requested form, job, or Quick Flow, you are returned to the original calling form.

Searching for a Form

You can search for a form using Object Search if you know part of the name, description, or type. If you do not know the exact form name, this is a very useful search tool.
There are three ways to access **Object Search**:

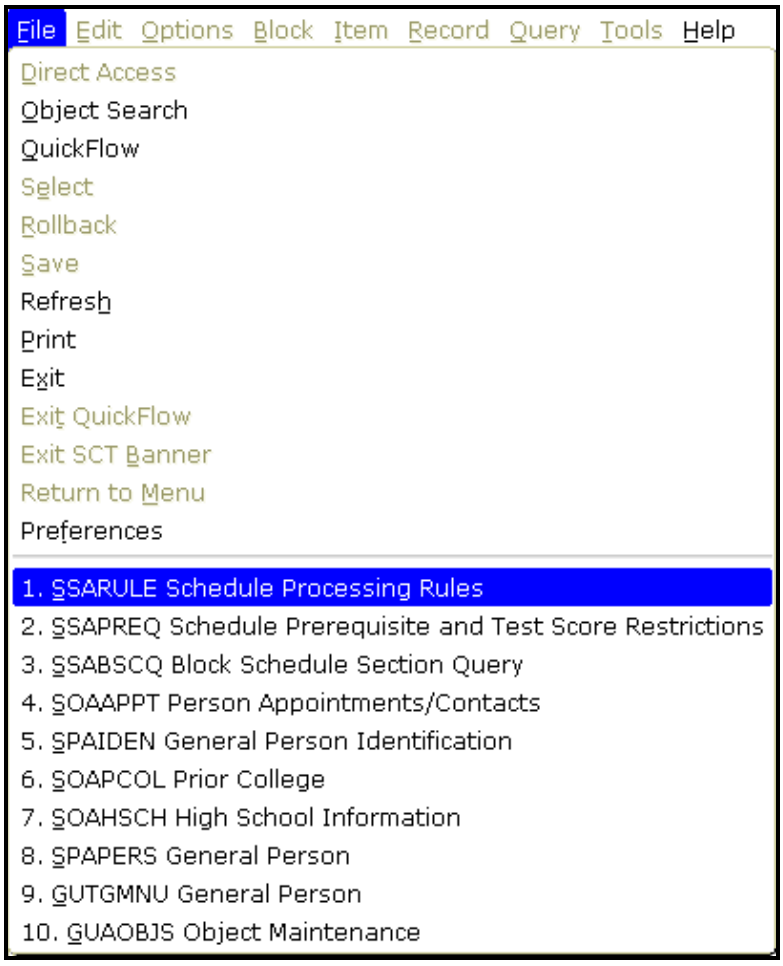
- On the **Main Menu,** double-click the **Go To** field
- On the **Main Menu,** select the **Search** button next to the **Go To** field.
- On the **File** menu, click **Object Search**
  The **Object Search** form displays.



6. Type your search criteria in the **Name**, **Description** or **Type** fields.
7. Click the **Execute Query** button .
   A list of the forms matching your criteria displays.
8. Scroll through the list and double-click the form name.
   The form displays.

Selecting a Recently Accessed Form

To reopen a form that you had used in your current Banner session, the **File** menu lists the last 10 recently used forms at the bottom of the drop-down menu. You can reopen any of these forms by simply selecting the form name you wish to access.

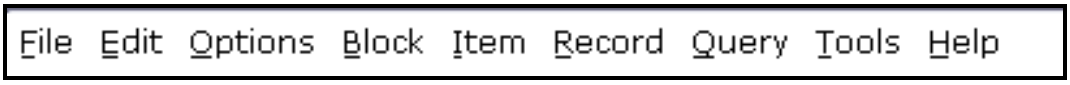


Note: The forms that do not appear in this list are the QuickFlow (GUAQFLW), Direct Access (GUAPARM), and Object Search (GUIOBJS) forms.

Using the Menu Bar

The menu bar comprises several option menus. These menus give you the commands you will need to use while working in Banner. The following menus are available in the Banner menu bar:

- File menu
- Edit menu
- Options menu
- Block menu
- Item menu
- Record menu
- Query menu
- Tools menu
- Help menu



File Menu

The File menu contains standard SunGard SCT Banner and Oracle functions. Some of the menu items call other forms. When you exit the called form, you return to the form you were previously using.

Direct Access	Displays the Direct Access form (GUAPARM), which is used to access a form by its seven character name.
Object Search	Displays the Object Search form (GUIOBJS), which is used to search for a menu, form, job, or QuickFlow with part of the name, description, or type.
QuickFlow	Displays the QuickFlow form (GUAQFLW), which is used to access a QuickFlow.
Select	Returns you to the calling form and enters the selected value into the field that called the form.
Rollback	**On Application and Inquiry forms:** Clears all information (except key information) and returns the cursor to the first field in the key block.
	On Validation and Query forms: Returns the cursor to the first field on the form.
Save	Saves all changes entered since the last time you saved.
Refresh	Clears the Auto Hint line.
Print	Prints the current window with the date and time in the title bar.

Exit	**On forms and windows:** Exits you from the form, window, or Banner if you are located at the Main Menu.
	On Main Menu: Exits you from Banner.
	In Query mode: Cancels the query and takes the form out of query mode.
Exit QuickFlow	Exits you from a QuickFlow.
Preferences	Displays the **Personal Preferences Maintenance** form (**GUAUPRF**), which is used to customize your view of Banner.
Accessed forms	List the recently accessed forms in the current logged on session and allows you to quickly re-access forms that were previously viewed in your current session (up to ten).

Edit Menu

This pull-down menu contains the functions used to edit text items.

Cut	Cuts selected text and places it on the clipboard.
Copy	Copies selected text to the clipboard.
Paste	Pastes text from the clipboard to the spot where the cursor is located.
Edit	Displays the Editor window, used to enter or update text. You can display this window from most fields. It is particularly useful in long data fields.

Options Menu

This pull-down menu contains navigation options. Navigation options vary from form to form and depend on where the cursor is currently located. Some options take you to other blocks within the current form. Other options take you outside the current form to related forms.

Block Menu

This pull-down menu contains the functions used to navigate among the blocks of information on a form.

Previous	Moves the cursor to the previous block that has at least one enterable field. If the previous block is in another window, that window is opened.
Next	Moves the cursor to the next block that has at least one field where data can be entered or edited. If that area is in another window, that window is opened.
Clear	Clears all information from the current block on your display (information is not removed from any records or tables).
View Supplemental Data	View additional data available on the form. This feature is not available on all forms.

Item Menu

This pull-down menu contains the functions used to navigate among the fields or items on a form.

Previous	Moves the cursor to the previous enterable field in the current block.
Next	Moves the cursor to the next enterable field in the current block. Occasionally, Next field moves the cursor to the first enterable field in the next block.
Clear	Clears all information from the current field on your display information is not removed from any records or tables).
Duplicate	In a blank row of a repeating record, copies the contents of the same field in the previous record into the new record. This is different from using "copy and paste."

Record Menu

This pull-down menu contains the functions used to work with records on a form.

Previous	Moves the cursor to the first enterable field in the previous record.
Next	Moves the cursor to the first enterable field in the next record of the current block. If the cursor is in the last record, a new record is created.
Scroll Up	Scrolls up the list of repeating records, putting the first displayed record near the bottom of the list.
Scroll Down	Scrolls down the list of repeating records, putting the last displayed record near the top of the list.
Clear	Clears all information from the current record on your display (information is not removed from any records or tables).
Remove	Removes all information from the current record. When you click **Save,** the removed information is deleted. There is NO undo for Remove, so any Remove action is permanent.
Insert	Inserts a new blank record into the list of existing records.
Duplicate	Duplicates the contents of all fields in the record and copies them into a new record.
Lock	Temporarily locks the contents of the record so no other Banner user can update or alter it. Save, Rollback, and Exit release the lock.

Query Menu

This pull-down menu contains the functions used to query information in the database based on specified criteria.

Enter	Puts the form into query mode so you can enter search criteria to see what information is already in the database.
Execute	Searches the database and displays the first set of records that match the search criteria.
Last Criteria	Enters the criteria from the last search (enabled only when one is in Query mode).
Cancel	Cancels the query and takes the form out of Query mode.
Count Hits	Counts the number of records that match the search criteria and displays that number in the Auto Hint line. This is a special function that depends on the query to work.
Fetch Next Set	If more records meet the search criteria than fit in the window, replaces the current set of displayed records with the next set.

Tools Menu

This pull-down menu contains Banner Document Management Suite (Extender) and Workflow. If you are able to access these tools, you will be trained by a representative from within your department.

Banner Document Management Suite	An integrated document imaging and electronic document management system for SCT Banner applications. It is designed to meet the imaging and document management requirements of higher education.
Workflow	An SCT solution that automates, simplifies, directs, and manages the flow of information through an entire organization. SCT Workflow can pass electronic documents, information, and tasks from one role player to the next for action, according to NMSU business rules.

Help Menu

This pull-down menu contains a number of forms of help.

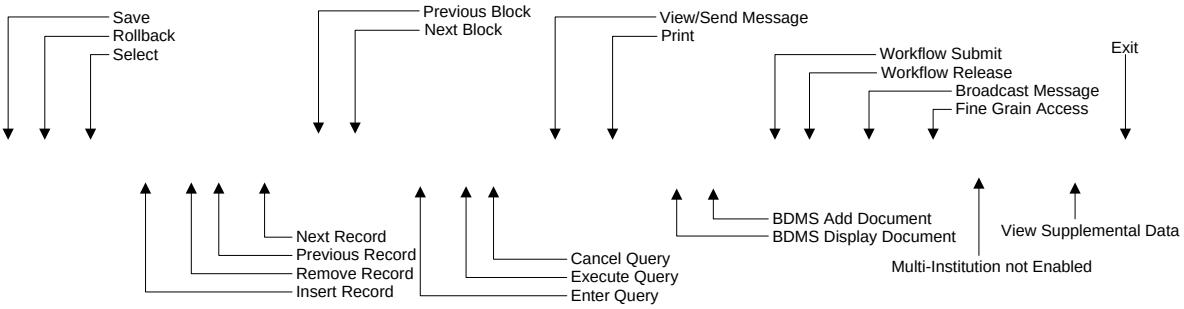
Online Help	Displays new online information for the current field.
Note: Disable if online help is not available for the form.	
Dynamic Help Query	Displays the Dynamic Help form (GUAHELP) in query mode, which is used to display help for a field, block, or form.
Dynamic Help Edit	Displays the Dynamic Help form (GUAHELP) in edit mode, which is used to edit traditional help for a field, block, or form.
Help	Displays the Oracle Item Properties window for the current field.
Show Keys	Displays the Keys list, which lists the functions and their equivalent keystrokes available for the current form, window, and field.
List	Displays the List of Values (valid entries for the current field) if one is available.
Note: The field name will be highlighted in blue, and "List of Values" is indicated in the Status Line.	
Display Error	If an Oracle error occurs, displays the code that is in error.
Display ID Image	With the cursor in an ID field, the image associated with the ID will be displayed, if available.
Calendar	Displays the calendar.
Calculator	Displays the calculator.
Extract Data with Key	This allows you to Extract Data with Key information to a .csv file.
Extract Data No Key	Allows you to Extract Data without Key Information to a .csv file.
Technical Support	Allows you to do the following: • Turn SQL Trace On • Turn SQL Trace Off • Set Query Optimizer to… o All rows o First rows o First rows (1) o First rows (10) o First rows (100) o Rule • Reconnect to Database.
About Banner	Displays the About Banner form (GUAABOT), which identifies the current form, release number, date, and time.

Using Shortcuts to Navigate

Banner offers you many ways to accomplish most tasks. When using a form there are three ways to execute commands: through the menu bar, the toolbar standard buttons, and keyboard equivalents.

Using the Toolbar

The toolbar is comprised of Standard Buttons used to execute commands. Many of these buttons have a command that can be found in the menu bar.
When you need to use one of the standard buttons, simply click on the button.



Keyboard Equivalents

In many cases, you can use combinations of keyboard keys to access a form, window, block, or field.

To access a form with keyboard equivalents:

1. Read the Auto Hint message to determine whether a predefined function lets you navigate to another form, (Count Query Hits, Duplicate Field, Duplicate Record, Exit with Value, and List are the most commonly predefined functions).
2. If a predefined function is available, use Show Keys (from the toolbar or the help pull-down menu) to find the keyboard equivalent for the predefined function.

To access a tab or block with keyboard equivalents:
Use the keyboard equivalents for Next Block (**CTRL + PAGE DOWN**) and Previous Block (**CTRL + PAGE UP**) to move among blocks or tabs. If the Next and Previous Blocks are in another tab, these keys take you to the other window. Sometimes there are actually two blocks that visually appear to be one, making it seem as though you are moving within the same block.

To access a field with keyboard equivalents:
Use the **TAB** key (Next Field) and **SHIFT + TAB** keys (Previous Field) to move among fields. If a field has the auto-skip feature, the cursor automatically moves to the next field as soon as you enter the required number of characters.

Program Functions and Keyboard Equivalent Commands
Click on the **Show Keys** toolbar icon, select Help, and then choose Show Keys from the menu bar (or press **CTRL+F1**) to acquire a list of program functions and their keyboard equivalents.

Note: Available keys change from screen to screen. In addition, not all keyboard commands are available from every form.

Keyboard Equivalent Chart

Function	Key(s)	Function	Key(s)
Cancel	**ESC**	Insert Record	**F6**
Clear Block	**SHIFT+F5**	Left	**LEFT**
Clear Field	**CTRL+U**	List, List Of Values	**F9**
Commit, Save	**F10**	New Record	**F6**
Count Query Hits	**SHIFT+F2**	Next Block	**CTRL+PAGE DOWN**
Clear Form, Rollback	**SHIFT+F7**	Next Field	**TAB**
Clear Record	**SHIFT+F4**	Next Record	↓
Debug Mode	**CTRL+?**	Previous Block	**CTRL+PAGE UP**
Delete Forward	**DELETE**	Previous Field	**SHIFT+TAB**
Delete Backward	**Backspace**	Previous Menu	**CTRL+ENTER**
Delete Record	**SHIFT+F6**	Previous Record	↑
Duplicate Field Entry	**F3**	Query - Execute	**F8**
Duplicate Record	**F4**	Query - Start New	**F7**
Edit	**CTRL+E**	Return	**ENTER**
Enter Application Parameters	**CTRL+F6**	Right	**RIGHT**
Enter Menu Parameters	**CTRL+F5**	Show Keys	**CTRL+F1**
Help, Item Properties	**F1**		

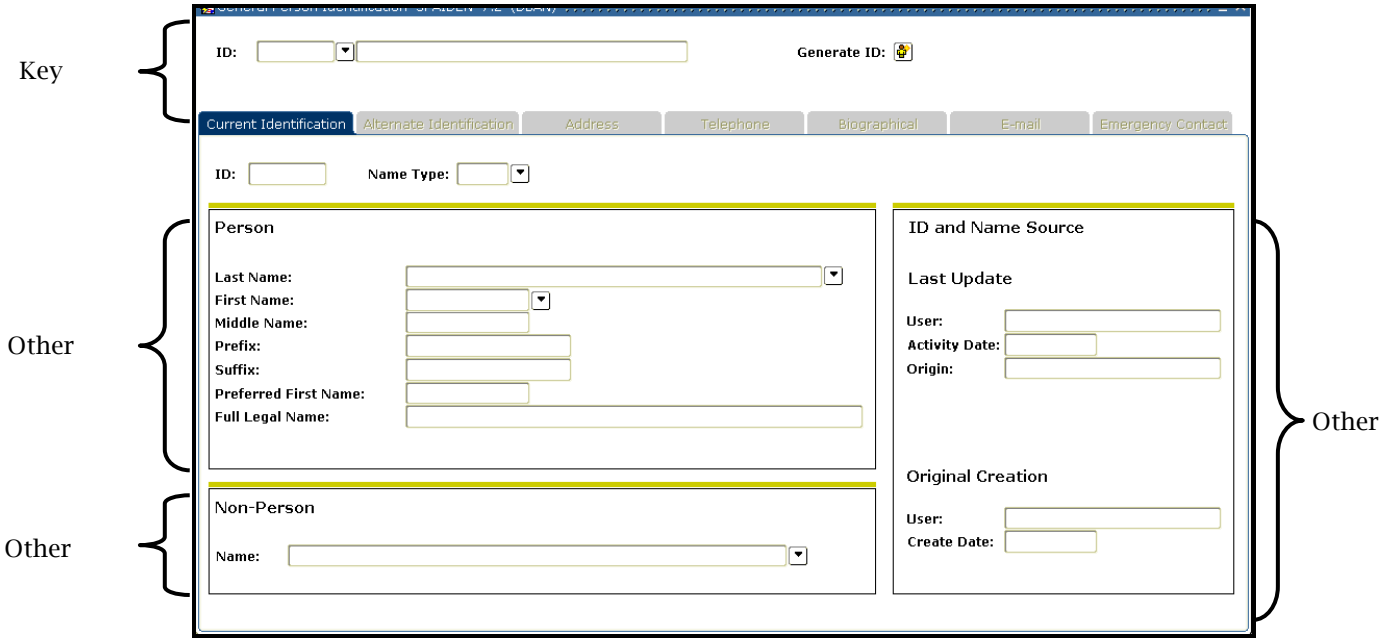
Identifying Blocks

A block is a section of a form or window that contains related information. There are two types of blocks:

- Key Block – contains identifying information such as an ID, or record identifier.
- Other Blocks – contain information pertaining to the key block information.

A form contains at least two blocks, one key block, and one other block. Each other block can be identified by the bordered edge.
Most blocks have a title. There are three exceptions:

- A key block does not have a title.
- If a form or window has only one block, the block does not have a title.
- If a form has a key block and only one other block, the second block has no title.



Key Block

The first block (key block) on most forms contains key information like an ID number or record identifier. The key block determines what is entered or displayed on the rest of the form. All information on the form references the key block.

The key block has at least one field and sometimes more. For example, a form that maintains population selection information may have key block fields for both an application and a selection ID (population selection).

The key block stays on the form as subsequent blocks appear. Occasionally, another window may appear on top of the key block if the window is unusually large or if the key block is not pertinent to the window.

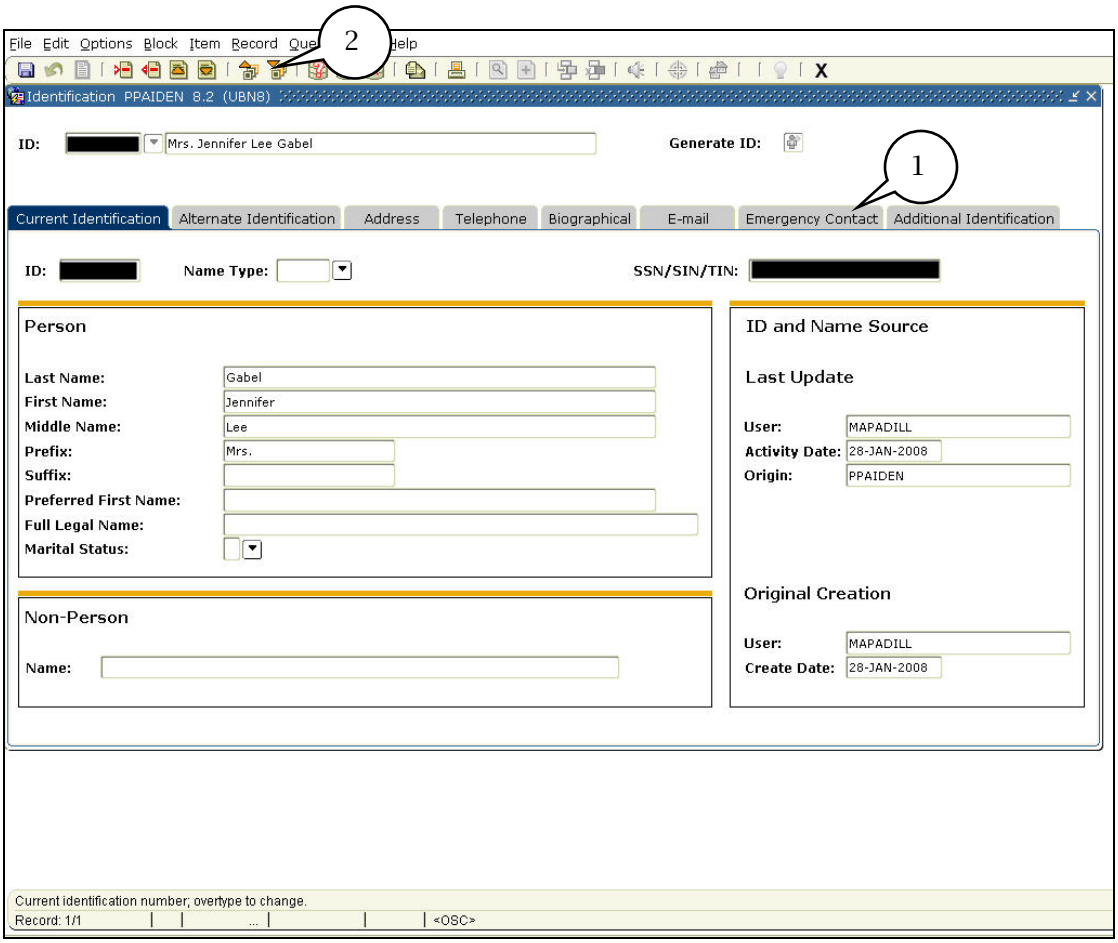
When the cursor is in the key block, enterable fields in the key block are enabled. When you leave the key block, enterable fields in the key block are disabled.

Other Blocks

Other blocks contain additional details pertaining to the key block information. Each block contains information related to the key block and is usually enclosed in an outlined box. The number of other blocks will vary from form to form and often contain optional fields.

Tabs/Next Block/Options

Often a form will have more information than can be displayed on one screen. When this is the case, you can view additional information by clicking on the page tabs, by using the **Next Block** button , or by using the **Options** menu.



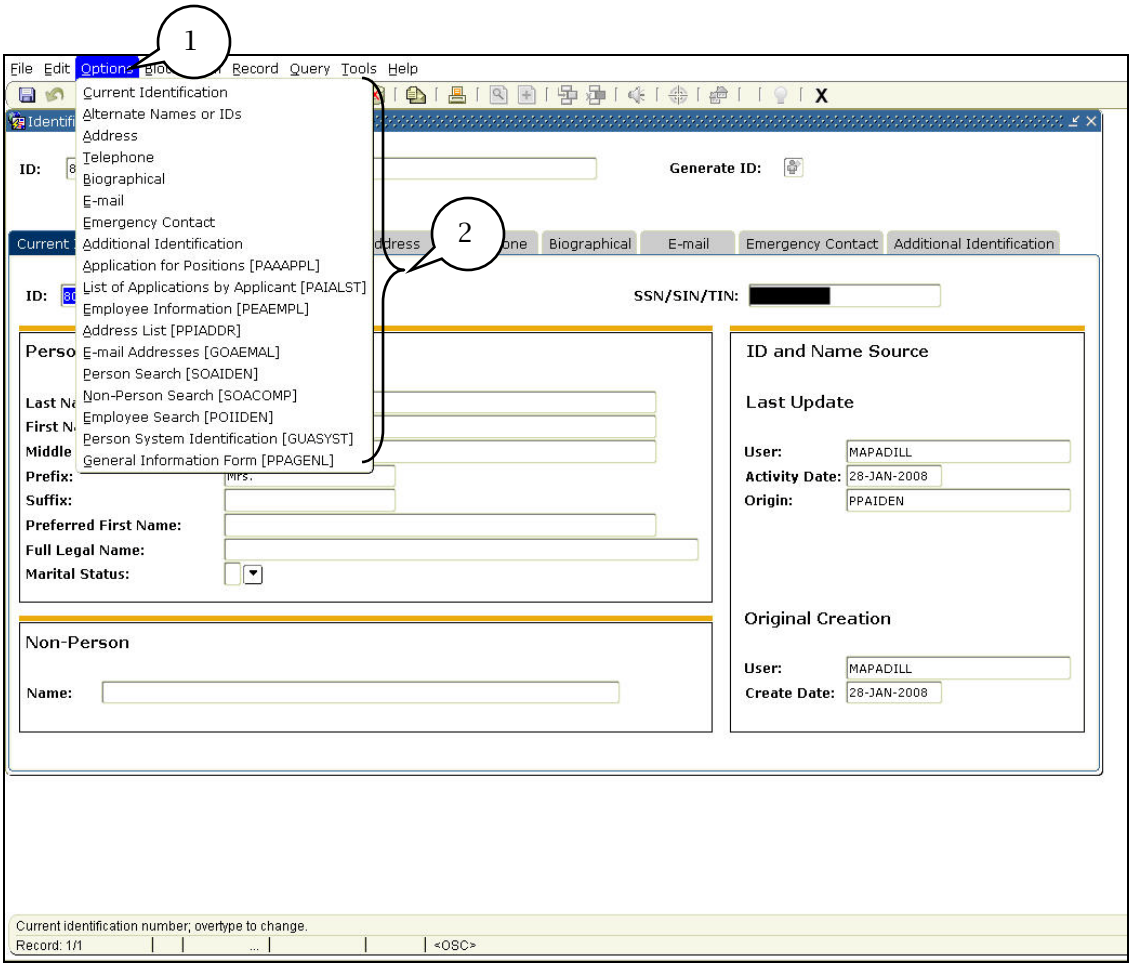
To use the page tabs:

1. Click on the tab for the information you need.

To use the **Next Block** button :

2. Click on the **Next Block** button .
    - On a form with tabs, the information for the tab to the right of the current one will be displayed.
    - On a form without tabs, the next block of information will be displayed.

*Note: personal identification data has been blacked out for privacy considerations.



To use the **Options** menu:

1. Click on the **Options** menu to display the list of additional information which can be accessed from the form.
2. Highlight and click on your selection.

*Note: personal identification data has been blacked out for privacy considerations.

Querying Information

Querying is the process of searching for information already entered in the database. You can use inquiry forms, query forms, and most application forms to perform queries.

Some forms automatically open in query mode, usually because a large number of records related to the form have to be retrieved. When a form opens in query mode, the **status line** displays **Enter Query.** You can immediately specify search criteria to narrow the search. If a form does not open in query mode, you must put the form into query mode before you can enter search criteria.

In this section we will cover:

- Defining Query Functions
- Using Wildcards in a Search
- Common Search Forms
- Common Search Fields
- Searching for a Person
- Searching for an Entity
- Searching Phonetically
- Searching with More Detail

Defining Query Functions

The following functions are query functions that can be used in Banner. All of these functions are located in the **Query** menu on the **Menu Bar**. These functions are active only when the form or field you are in is available for a query.

Enter	Puts the form into query mode so you can enter search criteria to see what information is already in the database. “Enter Query” appears in the status line.
Execute	Searches the database and displays the first set of records that match your search criteria. This function is enabled only if you are in query mode.
Last Criteria	Enters the criteria from your last search. You can change any of the criteria. This function is enabled only if you are in query mode.
Cancel	Cancels the query and takes the form out of query mode.
Count Hits	Counts the number of records that match the search criteria and displays that number in the auto hint.
Fetch Next Set	Replaces the current set of displayed records with the next set of records if more records match the search criteria than fit in the window. This function is enabled only if you are in query mode.

Using Wildcards in a Search

You may not always know the exact wording or spelling for which you are searching. You can use wildcards to help with your search. A wildcard is a symbol that represents one or many characters in a word.
You can use the following wildcards in the search criteria:

- Percent sign (**%**)
- Underscore (_)

The character (%) represents any number of unspecified characters. The character (_) represents one occurrence of an unspecified character.
The following examples illustrate the use of wildcards:

To get these results:	**Enter these criteria:**
All entries that contain "ma"	%ma%
All entries that begin with "ma"	ma%
All entries that have "ma" as the last two characters	%ma
All entries that have "m" as the second character	_m%

Common Search Forms

Performing an extensive ID/Name search for a person/entity's record in Banner is crucial. For a thorough search, the following common search forms should be used:

- **SOAIDEN:** Person Search
- **SOACOMP:** Non-Person Search
- **GUIALTI:** Alternate ID Search
- **FTIIDEN:** Entity Name /ID Search.

Common Search Fields

There are common Search Fields in Banner that allow you to search for a person/entity by either a partial or full ID/Name:

- ID
- Last Name
- First Name.

To search by a partial name/ID, remember to use the wildcards.

Examples of Partial Name Searches:

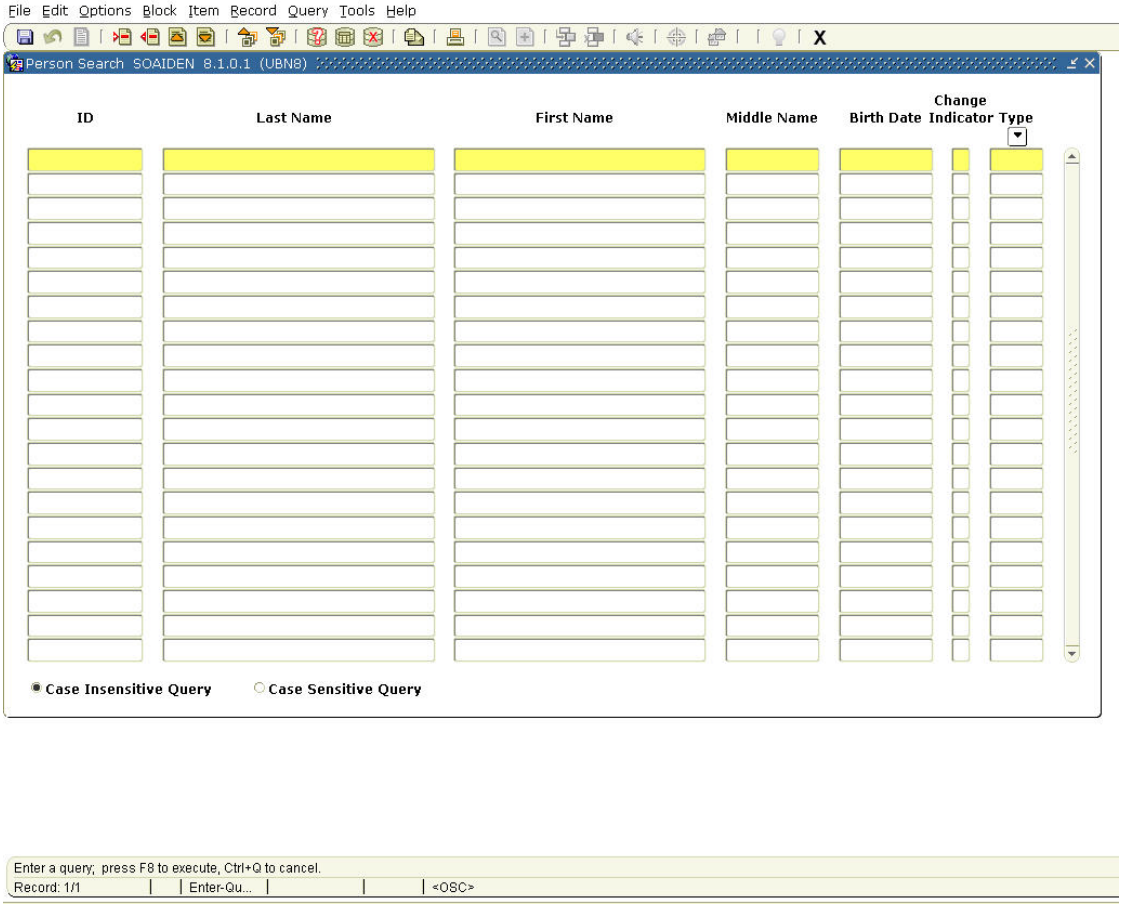
smith, M%	This search will return all ID's with the last name "smith", first names starting with "M".
%, Barbara	This search will return all ID's with first name "Barbara".
%onz%, Mary	This search will return all ID's with the last name containing "onz" and the first name Mary.
Jone_, Cindy	This search will return all ID's with the last name that starts with Jone and have any one letter at the end, and the first name Cindy.

Examples of Partial ID Searches:

21%	This search will return all ID's starting with 21.
12345678_	This search will return all ID's beginning in 12345678.
123%89	This search will return all ID's that begin with 123 and end in 89.

Searching for a Person

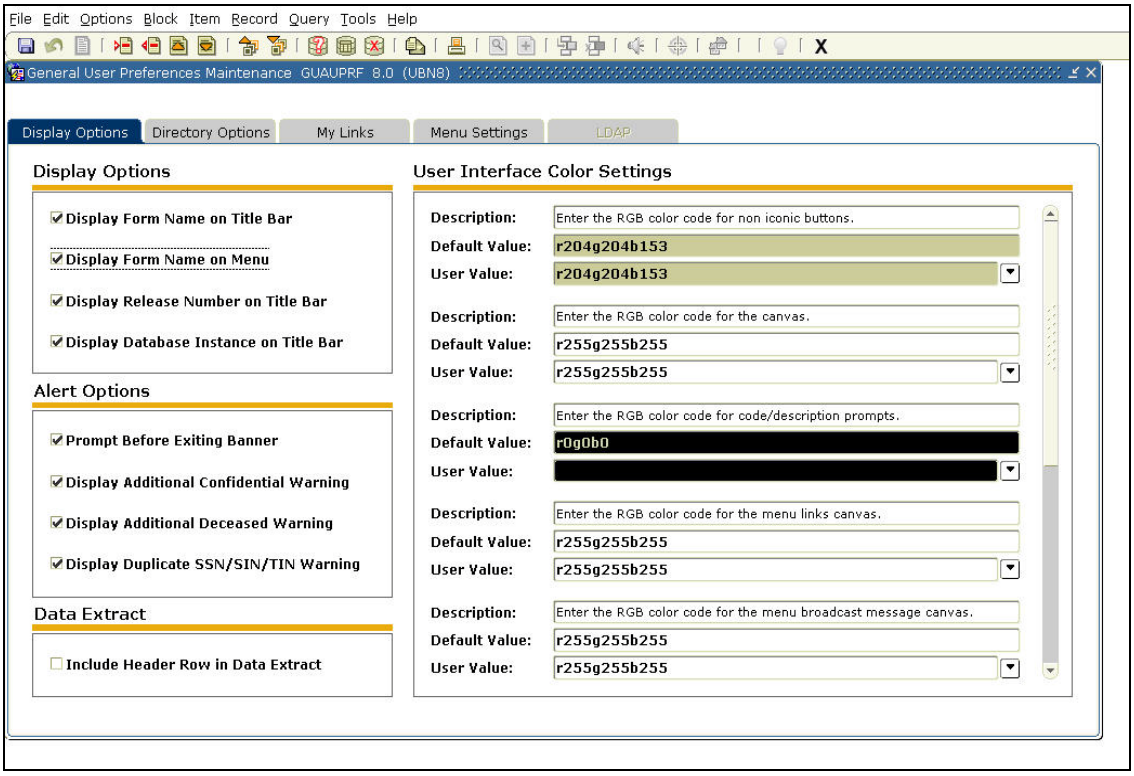
The **Person Search** form (**SOAIDEN**) searches for any person in the database. It may be accessed from all forms that require an ID number in the key blocks. This form may be used to determine the correct ID number for a person using the query capabilities of the system. The name, ID number, birth date, change indicator (an indicator to record name and ID changes—blank for the current record), and name type are displayed.



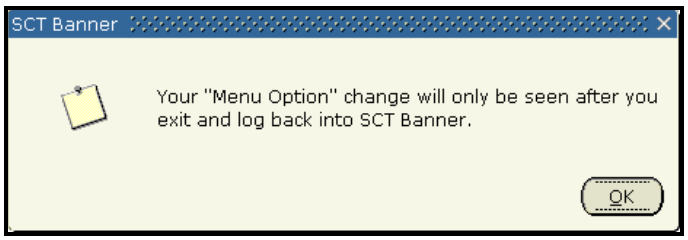
Changing Display Preferences

When logging into Banner you will be presented with the **Main Menu.** This menu is the starting point for navigating throughout Banner. To see the seven character form descriptions in the title bar, the **Display Options** properties must be set.

Setting the Display Options


File Edit Options Block Item Record Query Tools Help
General User Preferences Maintenance GUAUPRF 8.0 (UBN8)
Display Options
Directory Options
My Links
Menu Settings
LDAP
Display Options
Display Form Name on Title Bar
Display Form Name on Menu
Display Release Number on Title Bar
Display Database Instance on Title Bar
Alert Options
Prompt Before Exiting Banner
Display Additional Confidential Warning
Display Additional Deceased Warning
Display Duplicate SSN/SIN/TIN Warning
Data Extract
Include Header Row in Data Extract
User Interface Color Settings
Description: Enter the RGB color code for non iconic buttons.
Default Value: r204g204b153
User Value: r204g204b153
Description: Enter the RGB color code for the canvas.
Default Value: r255g255b255
User Value: r255g255b255
Description: Enter the RGB color code for code/description prompts.
Default Value: r0g0b0
User Value:
Description: Enter the RGB color code for the menu links canvas.
Default Value: r255g255b255
User Value: r255g255b255
Description: Enter the RGB color code for the menu broadcast message canvas.
Default Value: r255g255b255
User Value: r255g255b255

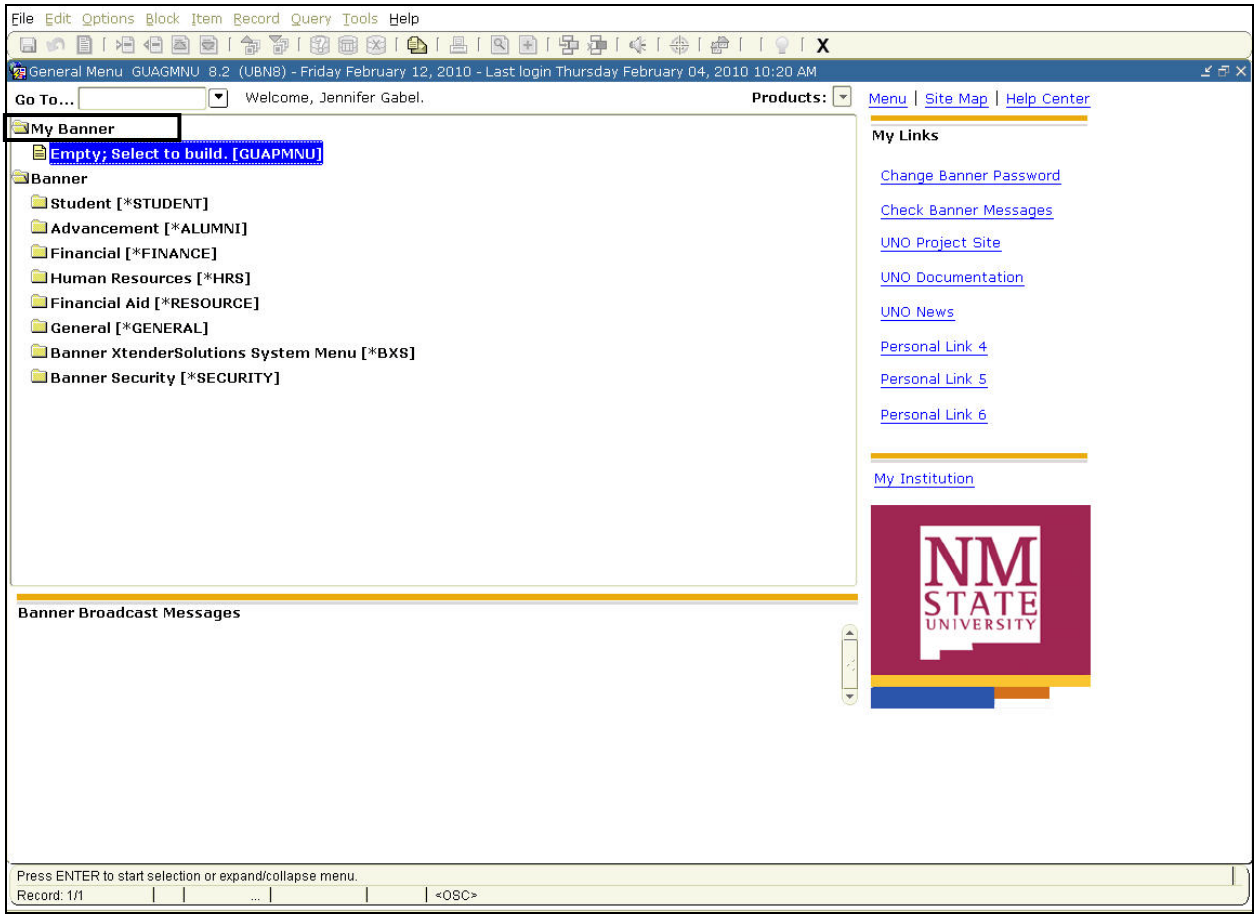
1. From the File menu, select Preferences.
   The General User Preferences Maintenance (GUAUPRF) form is displayed.
2. In the **Display Options** area, select the checkbox next to **Display Form Name on Menu**.
3. Click the **Save** button .
   A SCT Banner dialog box appears stating you must exit your Banner session and log on again before the preference changes will be seen.



4. Click **OK**.

Creating Personal Menus

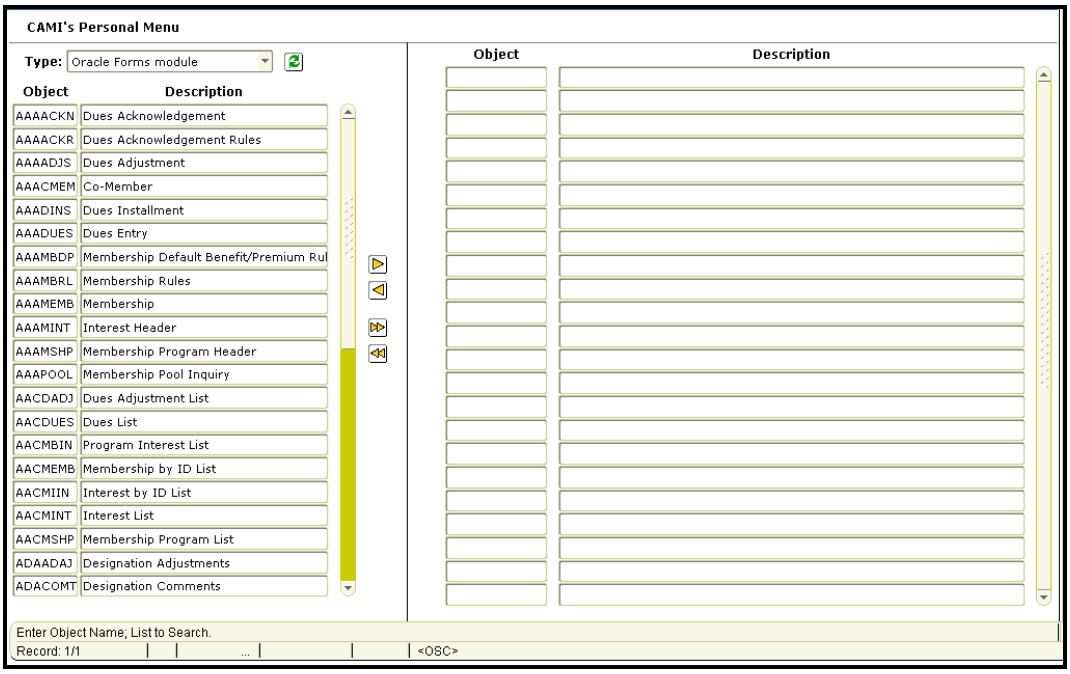
In Banner, users can establish a personal menu that allows you to organize forms that are most important in your workday. The personal menu is located under the **My Banner** folder on the **Main Menu**.



The **My Banner Maintenance** form (**GUAPMNU**) is used to create and change your personal menu your personal menu.

You can access your personal menu from the **Main Menu**. A personal menu is tied to your Banner username, which means that no matter where you log on to Banner, your personal menu will be available.

The field above the right pane shows the Banner username associated with the person logged on to the system.



There are three ways to add items to your personal menu:

- Scroll through the object list to find and select objects.
- Enter the name of the object.
- Query the object list to narrow your search.

Changes will only be seen after you exit and log back into Banner.

Adding Forms from the Objects List

You can add items from the object list by scrolling to find the item you need.

1. Access the Personal Menu Maintenance form (GUAPMNU).
2. In the left pane, select each object you want to add to the menu.
   When you select an object, the name is highlighted.
3. (Optional) Repeat steps 2 and 3 for each object type you want to add to the menu.

Note: You can select objects from multiple object types and insert them together.

4. Click in the right pane where you want to place the new menu items.
5. Click the **Insert Selection** button in the middle of the form.
   The selected objects are added to the right pane below the place you clicked.
6. (Optional) Customize the object descriptions.
7. Click the **Save** button .

Note: If you try to enter or drag an object which you are not permitted to access, the system will display an alert box. In order to proceed, you must delete the name of the object from the list by pressing the DELETE key.

Adding Forms by the Seven Character Identifier

If you have become familiar with the forms and their seven-character identifier, you can simply type the identifier to add the item to your menu.

8. Access the **My Banner Maintenance** form (**GUAPMNU**).
9. Place the cursor in a blank **Object** field in the right pane.
10. Enter the object's seven-character name.
11. Press **ENTER**. The object's type, description, and name appear in the right pane.
12. (Optional) Customize the object description.
13. Click the **Save** button .

Adding Forms by Query

If you are not sure of the full identifier for an item, you can query all the items in Banner.

1. Access the My Banner Maintenance form (GUAPMNU).
2. Use the pull-down list above the left pane to select the object type you want to query.
3. Place the cursor in the left pane.
4. Click the **Enter Query** button .
   The object list disappears.
5. Enter the search criteria.
6. You can use the wildcards (%) and (_).
   The search is case-sensitive. Data is matched against the search criteria exactly as you enter them.
7. Click the **Execute Query** button .
   The left pane lists the matching objects.
8. To add all matches to the menu (if there are 20 matches or less), click in the right pane where you want to place the new menu items.
9. Click the **Insert All** button in the middle of the form.
10. To add selected matches to the menu, select the objects in the left pane.
    Click in the right pane where you want to place the new menu items.
11. Click the **Insert Selection** button in the middle of the form.

Deleting selected objects from a personal menu

1. Access the **My Banner Maintenance** form (**GUAPMNU**).
2. In the right pane, select each object you want to delete.
   When you select an object, the name is highlighted.
3. Click the **Delete** button in the middle of the form.
   The selected objects are deleted.
4. Click the **Save** button .

Deleting all objects from a personal menu:

5. Access the **My Banner Maintenance** form (**GUAPMNU**).
6. Click the **Delete All** button in the middle of the form.
7. Click the **Save** button .

Help

If you need HELP with Banner Navigation, Web-Time and Leave Entry, or Self Service:

- **Call the ICT HelpDesk at 646-HELP (4357)**
- **E-mail help_admin@nmsu.edu**
- **For online help, documentation and interactive online training demos, go to:**

  http://hr.nmsu.edu/hrs/documents--demos.html

Glossary

The following information describes standard terms used within the Banner System.

Alert Box
A type of dialog box that pops up to notify you of a condition that may affect how you can enter information or the kind of information you can enter. It requires you to acknowledge the message before you can continue.

Application form
Form used to enter, update, or query information. (An application form will have the letter “A” in the third position of the form name.)

Block
An information area on a form separated by a solid line.

Calling form
Form from which you accessed another form.

Cancel
Exits you from an Option List, List of Values, Editor window, or Dynamic Help.

Clear form
Clears all information and returns you to the first enterable field in the key information area.

Commit
Saves all changes entered since the last time you saved.

Count Hits
In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Help Line.

Count Query Hits
In query mode, counts the number of records that meet the search criteria and displays that number in the Auto Help Line. To retrieved records, select the Execute Query Function.

Dialog Box
A box containing information. Requires you to respond to it before you can continue.

Down
Use the key. Moves the cursor to the first enterable field in the next record, moves you lower on a List of Values, and moves you lower in a pull-down list.

Drop-down List
Shows three or more values for a field. Any field with a down arrow icon contains a drop-down list.

Edit

Displays a window you can use to add, change, or delete text; especially useful in entering and updating Dynamic Help.

Enter Query

Puts the form into query mode and lets you enter search criteria to see what information is already in the database. ENTER QUERY appears in the Status Line.

Execute Query

In query mode, searches the database and displays data that matched the search criteria.

Exit

From forms and windows, exits you from the form or window. From menus, exits you from the Banner system. From query mode, cancels the query and takes the form out of query mode.

Exit with Value

From a called form, returns you to the calling form and enters the highlighted value into the field that called the form. From a List of Values (LOV), returns you to the calling form and enters the highlighted value into the field that called the form.

Exit without Value

From forms and windows, exits you from the form or window. From menus, exits you from the Banner system. From query mode, cancels the query and takes the form out of query mode.

Field

Area in a form where you can enter query, change information, or where existing information is displayed. Banner describes fields as: enabled, disabled, enterable, or display only.

Form

Screen allowing the display/update of information.

Help

Displays the Oracle help window for the current field.

Inquiry Form

Form used to look up existing information on the database. Allows you to view but not update (An inquiry form will have the letter “I” in the third position of the form name.)

List of Values (LOV)

Window containing valid items available for entry into a field. Displays a list of values for the current field if appears in the status line.

Menu

A list of options you can access with the mouse or keyboard.

More

The **More** indicator appears in the lower right corner of each window of a series of related forms (even the last form). It tells you that there are additional forms that can be accessed to complete a process.

Next Block
To move the cursor to the next information area (block) that has at least one enterable field.

Next Field
The next enterable field in the current information area.

Next Item
The next enterable field in the current information area.

Next Primary Key
From a called form, returns you to the calling form and enters the highlighted value into the field that called the form. From a List of Values (LOV), returns you to the calling form and enters the highlighted value into the field that called the form.

Next Record
To move the cursor to the first enterable field in the next record of the current information area. If the cursor is in the last record, a new record is created.

Object
An object can be a form, job, menu or QuickFlow used in Banner.

Option List
Dialog box displaying two or more items to choose from.

Pop-Up Window
Dialog box, alert box, or list of values that appear in a separate window.

Previous Block
The previous information area that has at least one enterable field. If the previous area is another window, then that window is opened.

Previous Field
To move the cursor to the previous enterable field in the current information area.

Previous Item
To move the cursor to the previous enterable field in the current information area.

Previous Record
To move the cursor to the first enterable field in the previous record.

Query Form
Form used to look up existing information on the database. (A query form has the letter "Q" in the third position of the form name.)

Quick Flow
A set of forms that are linked together in order to help you complete a process within Banner. When you use Quick Flow, it opens the first form in the set and the next form is automatically opened until the process is complete.

Record
All information displayed in the window for an item.

Rollback
From an application or inquiry form, clears all information and returns you to the key block area. Rollback is a standard button and appears on forms. From validation forms, rollback will return you to the first enterable field on the calling form.

Save
To permanently record changes to the database.

Scroll Down
The process of moving down repeating records or lists of information that cannot all be displayed in one window.

Select
Choose an item by highlighting it or clicking it with mouse.

Show Keys
Display the list of keyboard options.

Up
Use the key. To move the cursor the first enterable field in the previous record moves you upward on a List of Values or drop-down list.

Validation Form
Form used to define the values that can be entered in specified fields on application forms. (A validation form will have the letter “V” in the third position of the form name.

Window
An information area being displayed.

Appendix A: Form Name Structure

Position 1 identifies the primary system owning the form, report, job, or table.					
A	Alumni/Development	**L**	Occupational Tax/License	**U**	Utilities
B	Property Tax	**N**	Position Control	**V**	Voice Response
C	Courts	**O**	Customer Contact	**X**	Records Indexing
D	Cash Drawer	**P**	HR/Payroll/Personnel	**W**	Reserved for client
F	Finance	**Q**	Electronic Work Queue	**Y**	applications that
G	General	**R**	Financial Aid	**Z**	co-exist with Banner2000
I	Information Access	**S**	Student		
K	Work Management	**T**	Accounts Receivable		

Position 2 identifies the module owning the form, report, job, or table.					
General (G)		**Student (S)**		**Finance (F)**	
E	Event Management	**A**	Admissions	**A**	Accounts Payable
J	Job Submission	**C**	Catalog	**B**	Budget Development
L	Letter Generation	**E**	Support Services	**C**	Cost Accounting
O	Overall	**F**	Registration/Fee Assessment	**E**	Electronic Data Interchange
P	Purge	**G**	General Student	**F**	Fixed Assets
S	Security	**H**	Grades/Academic History	**G**	General Ledger
T	Validation form/table	**I**	Faculty Load	**I**	Investment Management
U	Utility	**K**	Reserved for SCT Intl.-UK	**O**	Operations
X	Cross product	**L**	Location Management	**P**	Purchasing/Procurement
Accounts Receivable (T)		**M**	CAPP	**R**	Research Accounting
F	Finance Accounts Receivable	**O**	Overall	**S**	Stores Inventory
G	General Accounts Receivable	**P**	Person	**T**	Validation form/table
O	Overall	**R**	Recruiting	**U**	Utility
S	Student Accounts Receivable	**S**	Schedule	**X**	Archive/Purge
T	Validation form/table	**T**	Validation form/table	**Alumni/Development (A)**	
U	Utility	**U**	Utility	**A**	Membership
Financial Aid (R)		**HR/Payroll/Personnel (P) Position Control (N)**		**D**	Designation
B	Budgeting	**A**	Application	**E**	Event Management
C	Record Creation	**B**	Budget	**F**	Campaign
E	Electronic Data Exchange	**C**	COBRA	**G**	Pledge and Gift/
F	Funds Management	**D**	Benefit/Deductions		Pledge Payment
H	History and Transcripts	**E**	Employee	**M**	Prospect Management
J	Student Employment	**H**	Time Reporting/History	**O**	Organization
L	Logging	**O**	Overall	**P**	Constituent/Person
N	Need Analysis	**P**	General Person	**S**	Solicitor Organization
O	Common Functions	**R**	Electronic Approvals	**T**	Validation form/table
P	Packaging & Disbursements	**S**	Security	**U**	Utility
R	Requirements Tracking	**T**	Validation/rule table	**X**	Expected Matching Gift
S	Student System Shared Data	**U**	Utility	**Information Access (I)**	
T	Validation form/table	**X**	Tax Administration	**S**	Student
U	Utility			**R**	Financial Aid
All Products					
W Y Z	Reserved for client forms or modules used within a Banner2000 application (character in position 1 does not equal W, Y, or Z)				

Position 3 identifies the type of form, report, job, or table.

General (G)		**Student (S)**		**Finance (F)**	
A	Application form	**A**	Application form	**A**	Application form
B	Base table	**B**	Base table	**B**	Base table
	Batch COBOL process	**I**	Inquiry form	**I**	Inquiry form
I	Inquiry form	**P**	Process	**M**	Maintenance form
O	Online COBOL process	**Q**	Query form	**Q**	Query form
Q	Query form	**R**	Rule table	**R**	Rule table
R	Rule table		Repeating table		Repeating table
	Repeating table		Report/process		Report/process
	Report/process	**V**	Validation form/table View	**V**	Validation form/table View
T	General maintenance				
	Temporary table				
V	Validation form/table View				

Accounts Receivable (T)					
A	Application form	**P**	Process	**R**	Report
I	Inquiry form	**Q**	Query form	**V**	Validation form/table

Financial Aid (R)		**HR/Payroll/Personnel (P) Position Control (N)**		**Alumni/Development (A)**	
A	Application form	**A**	Application form	**A**	Application form
B	Base table	**B**	Base table	**B**	Base table
I	Inquiry form		Batch COBOL process	**C**	Called/list form
P	Process/report	**I**	Inquiry form	**I**	Inquiry form
R	Rule table	**P**	Process	**P**	Process/report
	Repeating rules table	**R**	Rule table	**R**	Repeating rules table
	Report		Repeating table	**T**	Temporary table
T	Temporary table		Report/process	**V**	Validation form/table View
V	Validation form/table View	**V**	Validation form/table		
Information Access					
R	Report				

Positions 4, 5, 6, and 7 uniquely identify the form, report, job, or table.

Examples:

SPAIDEN		**ADPFEED**		**PTVESKL**	
S	Student	**A**	Alumni/Development	**P**	Personnel
P	Person	**D**	Designation	**T**	Validation form/Table
A	Application	**P**	Process	**V**	Validation form/Table
IDEN	Identification	**FEED**	Feed to Finance	**ESKL**	Employee Skill

Notes:

Notes: